

UCR

eBuy / Accounts Payable Users Group Meeting

March 28, 2019

Alumni & Visitor's Center

BFS – Business & Financial Services

A Division of Business & Administration Services (BAS)



UNIVERSITY OF CALIFORNIA, RIVERSIDE

Agenda

- **Staffing Update**
(Ellery Triche)
- **Independent Contractor Agreements: Updated Procedures**
(Gae Purvis)
- **Furniture Purchasing—Ordering Process & Upcoming Program Changes**
(Kathy Ensign)
- **Hybrid Pro-Card FAQ's**
(Dana Allen)

Staffing Updates



Accounts Payable

None

Procurement Services

- Pro-Card Administrator III

David Ramos

- Procurement Analyst IV
(Science & Research)

In Recruitment--Interviewing

- Procurement Analyst IV
(Information Technology)

In Recruitment

- Pro-Card Administrator IV

On Hold



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Independent Contractor Agreements: Updated Procedures

Gae Purvis
Procurement Analyst

Overview

UCOP has revised the policy and procedures to secure the services of an independent contractor.

We want to make sure we comply with state and federal laws regarding classification of workers as independent contractors or employees.

To ensure this occurs, we are incorporating an additional step in the local procurement process.

The purpose of today's review is to ensure all requests for purchase are in compliance by showing you the changes to the Independent Contractor Classification Form.

Independent Contractor Forms

Current Independent Contractor Classification Form

UC RIVERSIDE UNIVERSITY OF CALIFORNIA RIVERSIDE
Independent Contractor Classification Form

Part 1 – To be completed by the Unit or Department submitting the Requisition
Classification Worksheet For Federal Tax Purposes

This portion of the worksheet addresses federal tax compliance only. There are other state and federal laws regarding classification of workers as independent contractors or employees. For example, to determine whether a worker is an employee for unemployment insurance purposes, please refer to the Employment Determination Guide issued by the State of California Employment Development Department (EDD), which is available at http://www.edd.ca.gov/pdf/pub_ctr96-38.pdf. For more information on unemployment insurance, you may also consult the Accounting Manual Chapter T-182-77.5, Payroll: Unemployment Insurance, on the internal payroll site.

Department: [Click here to enter text.](#)

Name of Contractor
[Click here to enter text.](#) Check the box that applies:
 Sole Proprietor Partnership Corporation

Name of Company	Contactor Phone Number	Contactor E-mail address
Click here to enter text.	Click here to enter text.	Click here to enter text.

Contactor Address (street address, city, state, zip code)
[Click here to enter text.](#)

If a foreign national or non-US citizen provide:	Country of Citizenship Click here to enter text.	Visa Type Click here to enter text.
Is the proposed contractor a current employee?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
If no, is it expected that the University will hire this proposed contractor as an employee following the termination of this service?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Was the proposed contractor a University employee any time during the last year and did he or she provide the same or similar services while an employee?	<input type="checkbox"/> Yes <input type="checkbox"/> No	

Part 2 – To be completed by the Unit or Department submitting the Requisition
IRS Classification Factors

Before the University enters into a contract with an independent contractor, the following checklist must be completed to help determine whether an employer/employee relationship exist.

IRS Classification Factors (Yes = Employee and No = Contractor)

Behavioral Control: Right to direct and control details and means by which worker performs services.

1. Instructions. Will the University have the right to give the worker instructions about when, where and how he or she is to do the job?	<input type="checkbox"/> Yes <input type="checkbox"/> No
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Financial Control: Right to direct and control economic aspects of the worker's activities.

2. Significant Investment. Has the worker failed to invest in facilities (such as an office) used to perform services?	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. Payment of Expenses. Will the University pay the worker's business or travel expenses?	<input type="checkbox"/> Yes <input type="checkbox"/> No

Independent Contractor Information Form
Formerly known as the Independent Contractor Pre-Hire worksheet v.1.3
Revised September 2018

Page 1 of 2

Updated Independent Contractor Classification Form

UC RIVERSIDE UNIVERSITY OF CALIFORNIA RIVERSIDE
Independent Contractor Classification Form

Part 1 – To be completed by the Unit or Department submitting the Requisition
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This portion of the worksheet addresses federal tax compliance only. There are other state and federal laws regarding classification of workers as independent contractors or employees. For example, to determine whether a worker is an employee for unemployment insurance purposes, please refer to the Employment Determination Guide issued by the State of California Employment Development Department (EDD), which is available at http://www.edd.ca.gov/pdf/pub_ctr96-38.pdf. For more information on unemployment insurance, you may also consult the Accounting Manual Chapter T-182-77.5, Payroll: Unemployment Insurance, on the internal payroll site.

Department: [Click here to enter text.](#)

Name of Contractor
[Click here to enter text.](#) Check the box that applies:
 Sole Proprietor Partnership Corporation

Name of Company	Contactor Phone Number	Contactor E-mail address
Click here to enter text.	Click here to enter text.	Click here to enter text.

Contactor Address (street address, city, state, zip code)
[Click here to enter text.](#)

If a foreign national or non-US citizen provide:	Country of Citizenship Click here to enter text.	Visa Type Click here to enter text.
Is the proposed contractor a current employee?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
If no, is it expected that the University will hire this proposed contractor as an employee following the termination of this service?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Was the proposed contractor a University employee any time during the last year and did he or she provide the same or similar services while an employee?	<input type="checkbox"/> Yes <input type="checkbox"/> No	

Will work be performed on campus? Yes No

Proposed Contract Work Information: Describe in full detail the services requested. Include deliverables, milestones, benchmarks and special terms:

Period of performance: Start date: _____ End date: _____

Rate of pay: Hourly Rate: _____ Fixed fee: _____

Independent Contractor Information Form
Formerly known as the Independent Contractor Pre-Hire worksheet v.1.3
Revised February 2019

Page 1 of 3

Independent Contractor Forms

The updated form is now requesting the following information:

- Will the work be performed on campus?
- Description of the work
- Dates of Service
- Rate of pay

Will work be performed on campus?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Proposed Contract Work Information: Describe in full detail the services requested. Include deliverables, milestones, benchmarks and special terms:	
Period of performance: Start date: _____ End date: _____	
Rate of pay: Hourly Rate: _____ Fixed fee: _____	

Independent Contractor Forms (Con't.)

- Departments will now have to list reasons to support hiring the individual as an employee or reasons to support hiring the individual as a contractor. (See IRS Publication 1779 – link is in UCR Policy 750-27)
- The update requires **the HR Policy Compliance Analyst to review completed documentation *prior to* submitting a purchase requisition. The Form should be emailed to hrpolicy@ucr.edu. Allow 2-4 days for HR to complete their review.**
- Certificates of Insurance: Departments are still required to obtain a COI from the supplier ***prior*** to submitting the requisition
 - For more details about UC supplier/contractor insurance programs go to Campus Connexions at: ucriver.campusconnexionsuc.com

Independent Contractor Forms (Con't.)

- **Another important update** is **the Agreement term CANNOT exceed a total of 12 months**
- **Reminders:**
 - Department's should complete the **Potential Conflict of Interest Form** if they wish to hire individuals who are near relatives, current, or former employees and have it reviewed by Procurement before submitting the purchase requisition. The new form is more streamlined and flows concurrently with the updated Independent Contractor Classification Form.
 - *Requests for Personal or Professional Services must be submitted as a purchase requisition **regardless of the dollar amount.** **DAPO's are not allowed (as per Policy 750-39)***

Independent Contractor Forms (Con't.)

STEPS FOR PROCESSING:

- Complete Independent Contractor Classification form
- Submit form to Central Human Resources (hrpolicy@ucr.edu) to confirm if individual should be an independent contractor or employee
- If confirmed as an independent contractor, obtain Certificate of Liability Insurance. (For questions regarding insurance, contact Risk Management)
- If necessary, complete the Conflict of Interest form
- Attach all completed documents to the purchase requisition and submit to Procurement.

Independent Contractor Forms (Con't.)

The Procurement webpage (procurement.ucr.edu) has all the necessary forms and additional information under the Forms tab:

The screenshot shows the website <https://procurement.ucr.edu/procurement/forms.html>. The page title is "UNIVERSITY OF CALIFORNIA, RIVERSIDE Procurement". The breadcrumb trail is "UCR Home > BAS > BFS > Procurement > Procurement Services > Forms".

The main content area is titled "Forms" and is divided into two columns. The left column contains a list of links, with "Forms" circled in red. The right column contains links to various forms, with "Independent Contractor" forms highlighted.

Forms

Home

Accounts Payable
AP Disbursement & Travel

Business Contracts
Non-Research Business Contracts

Procurement Services
Campus Purchasing

- > Fraud Prevention
- > General Information
- > OMB Uniform Guidance
- > Partial Sales Tax Exemption
- > Information for Suppliers
- > Terms & Conditions
- > Strategic Sourcing
- > Sustainability
- > Sources for Goods and Services
- > Ordering Regulated Chemicals
- > Procurement Card
- > Restricted Items
- > **Forms**
- > Who Buys What
- > Announcements and Notices

Unauthorized Purchase

- [Unauthorized Purchase Declaration Form](#)
- [Unauthorized Purchase ePay Request Form](#)

Independent Contractor

- [Independent Contractor Classification Form](#)
- [Independent Contractor Workflow](#)
- [Insurance Requirements for Independent Contractors](#)
- > [Policy Number: 750-27](#)

Conflicts of Interest

- [Conflict of Interest Form](#)

Source Selection & Price Reasonableness

- [Source Selection & Price Reasonableness form \(SSPR\)](#)
- [Instructions to Complete SSPR Form](#)
- [FAQ for SSPR Form](#)
- [Certified Cost Pricing Data Form](#)
- [Supplier Profit Form](#)

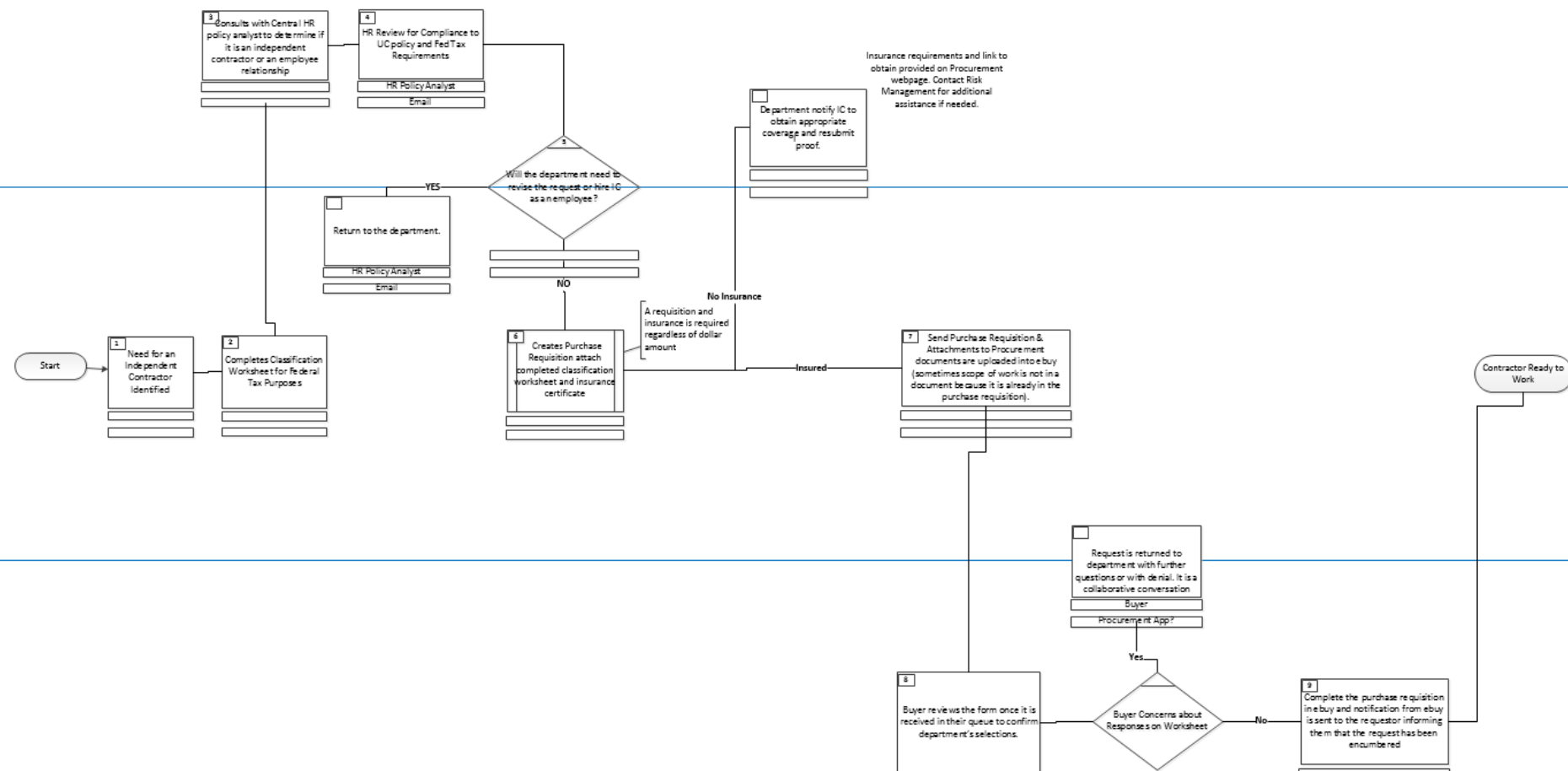
Equipment Loan

- [Equipment Loan Agreement](#)

Vendor Forms

- [W-9](#)
- [UCR Business Information Form](#)

Independent Contractor Forms (cont.)



Questions





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Furniture Purchasing

Kathy Ensign
Procurement Analyst

Furniture Purchases

Overview:

- eBuy Ordering
- Permit Approval Requirements
- Furniture & Fire Safety Requirements
- Purchase of Used Furniture
- UC Sustainability Policy



Furniture Purchases

eBuy Ordering

- **Steelcase is UC's Preferred Furniture Manufacturer (UC Agreement #2184)**
 - BKM is the local distributor for Steelcase furniture and installation. They are not the preferred supplier for A/V products/services. (UC RFP in process for A/V)
 - Prevailing wage requirement
 - The agreement # must be referenced on all DAPO's for BKM orders
 - **The P-Card is not used for furniture orders at this time**
- **All purchases should follow the applicable UC /UCR policies and procedures**
- **Current UC-Approved manufacturers for Ergonomic height adjustable desks & seating include:**

	<u>Local Distributors</u>
○ Grandstands	Bluespace, Source One
○ Workrite	Bluespace, Source One, BKM
○ Steelcase	BKM
○ Herman Miller	G/M
○ Sitmatic chairs	
○ Office Master chairs	Bluespace, Source One

Furniture Purchases

Permit Approval Requirements

- UCR established and posted a mandated furniture approval process online since 2018. The process requires:

Submit scaled floor plans including a diagram of electrical outlets for office spaces and furniture placement to ensure there are no obstructions to walkways or exits.

A floor plan is required for modular furniture systems with privacy walls (p-wall), electrical, or bolted to walls or floors.

- Complete a building permit application through the link on the A&E site:
<https://ae.ucr.edu/quality/qa.html>
*Turnaround time is approximately 14 calendar days.
- Contact for Information and Requests for building permits:
Lezlie Howard Project manager Lezlie.Howard@ucr.edu
- **Freestanding furniture** (e.g., height-adjustable desks, conference tables, and chairs) do not usually require a permit.

Furniture Purchases

Furniture & Fire Safety Compliance

All office and campus residential furniture containing metals, foam, and fabrics must be rated to CA Fire Safety Standards (CA Standard TB-117)

Purchase documentation must include safety rating details.

- Obtain a cut sheet from the furniture dealer or manufacturer, which lists whether the fabric is fire-rated to TB-117.
- Obtain scaled drawing to show walkway distance for ADA requirements
- Submit the cut sheet and drawing to: UCR Fire Marshall, contact Michelle Griffen michelle.griffen@ucr.edu

Note: Most commercial distributors (e.g., BKM, Bluespace Interiors, G/M Business Interiors, and Krueger) meet the TB-117 requirements

PLAN REVIEW & PERMIT PROGRAM IS REQUIRED

Permit Required- System Furniture Installation: (Modular workstations include P-Walls, doors, overhead bookshelves attached to the wall, or any furniture requiring construction, or attachments to floors and/or walls.)

- Allow time for the Plan Review approval process
- Apply for Campus Building Permit Application <https://ae.ucr.edu/quality/ga.html>

Submit electronic documents with Application To: Lezlie.howard@ucr.edu

- Plan of overall Building and floor locations of installation (Contact your Dept. Space Planner)
- Floor plans with room dimensions, proposed furniture arrangement and/or equipment (Vendor to provide)
- Specify if new electrical & data are required
- Room elevation plans including ceiling height dimensions and sprinkler head, Smoke Detector, HVAC and other locations (Request from Nelly Zaki @ nelly.zaki@ucr.edu)
- Manufacturer furniture cuts sheets, desk widths, and partition wall height dimensions (Vendor to provide)
- Installation/connection details for the walls to the existing walls, floors and deck above. This is required for each installation. (Vendor to provide)
- Once the work is completed, request a final inspection and a final inspection will be conducted. If approved, the permit will be signed as approved and complete <http://ucr.cforms.net>. Contact Lezlie.howard@ucr.edu for access

Furniture Exempt from Campus Building Permit

(Chairs, sofas, patio furniture, general classroom desks, interior finishes) plaster or wood, or applied materials such as wallpaper, paint, or trim.

- Submit dimensioned Floorplan with detailed location of proposed furniture
- Submit Cut Sheets or Specification on furniture flammability
- Upholstered Furniture Certification TB117
- Interior Finishes must reference CBC Chapter 8- (plaster or wood, or applied materials such as wallpaper, paint, or trim.

Submit Plans To: Michelle Griffen @ michelle.griffen@ucr.edu – Assistant to Fire Marshal
(The Campus Fire Inspectors, Cesar Pla & Xavier Martinez, will review and approve)

Facilities Services Dept: Identifies electrical & power connections on plans Schedules with Department

ITS: Identifies data requirements Schedules with Department

Furniture Purchases

Used Furniture Purchases

We should not assume that used furniture is rated to CA Fire Standards. Department Transactors must contact the Campus Procurement Buyer prior to engaging with a used furniture dealer. Procurement will review the dealer's: warranty, registration with DIR for cubicle installation, acceptance of UC payment terms, and seek to avoid furniture deposits.



Note:

1. For safety reasons, the Campus Fire Marshall discourages use of personal furniture on campus, unless it has been approved in writing
2. Staff and Faculty should not purchase and request reimbursement for furniture items

Furniture Purchases

Furniture must follow UC Sustainable Procurement Guidelines

https://www.ucop.edu/procurement-services/_files/sustainableprocurementguidelines.pdf

- Look for furniture with metals and fabrics that are free of the “6-classes” of hazardous additives including: Cadmium, Mercury, Polyvinyl Chloride (PVC), Toxic Chemicals, and anti-microbial agents.
- Ensure seat cushion foam, laminate desktops, chair fabrics, and privacy panels meet UC Sustainability Procurement Guidelines. (Reference p. 17 of Sustainable Procurement Guidelines.pdf)
- Indoor Furniture must meet:
 - GreenGuard Gold or Advantage Gold, or BIFMA Level requirements



Furniture Purchases

UC Sustainable Procurement (Cont'd)

Additional guidelines for **sustainable furniture purchases**:

- Should be free of flame retardant chemicals
- Shall comply with BIFMA e3-2014, sustainability Standard, which means containing none or reduced Formaldehyde and Volatile Organic Compounds. (VOC's.)
- Should be free of added or built in Antimicrobials
- Should be free of polyvinylchloride (PVC) greater than 1% of product by weight



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Hybrid Card FAQ's

Dana Allen
Pro-Card Administrator

Hybrid P-Card FAQs

- **Is ground transportation allowed on the P-card?**

No

Only airfare is an allowable option. Reservations and payments for car rentals, shuttles, taxi's, buses, etc. must be obtained and paid using a Corporate T&E card or personal credit card. Subject to travel policy and pre-approval requirements.

- **Are incidental and add-on travel related expenses (e.g. meals not included in the conference registration fee parking, internet, gas, or other vehicle services) allowed on the P-Card?**

No

These expenses must be paid via the Corporate T&E card or personal credit card and submitted in iTravel for reimbursement. UC Travel Policy (G-28) and P-Card Policy #750 are applicable.

Hybrid P-Card FAQs

- **Can the P-Card be used with third party suppliers (e.g., Travelocity, Priceline)?**

No

Most often these transactions will decline on the P-Card since these entities do not fall under the Hybrid P-Card use.

- **How do I identify on a receipt if a P-Card was used versus a Corporate T&E card or Personal credit card?**

The last 4-digits of the card used should appear on the suppliers receipt/invoice. The Department Card Assistant (DCA) will see P-Card transactions post on the P-Card Aging Report default FAU 780315 to reconcile. When moving the expense, the DCA should include the Trip ID# in the PCT entry, and the Travel Coordinator must list the expense on the travelers Trip ID in iTravel as Prepaid via P-Card. Corporate Card and personal credit card transactions do not post to the P-Card Aging Report.

Hybrid P-Card FAQ's

- **Can the P-Card be used when personal travel is involved?**

No

This may be considered misuse of University funds. Personal expenses should never be charged to or temporarily funded by the University.

My traveler's itinerary includes personal days/stops. We completed an airfare comparison showing the personal time does not increase the cost.

Can we book the airfare on the P-Card?

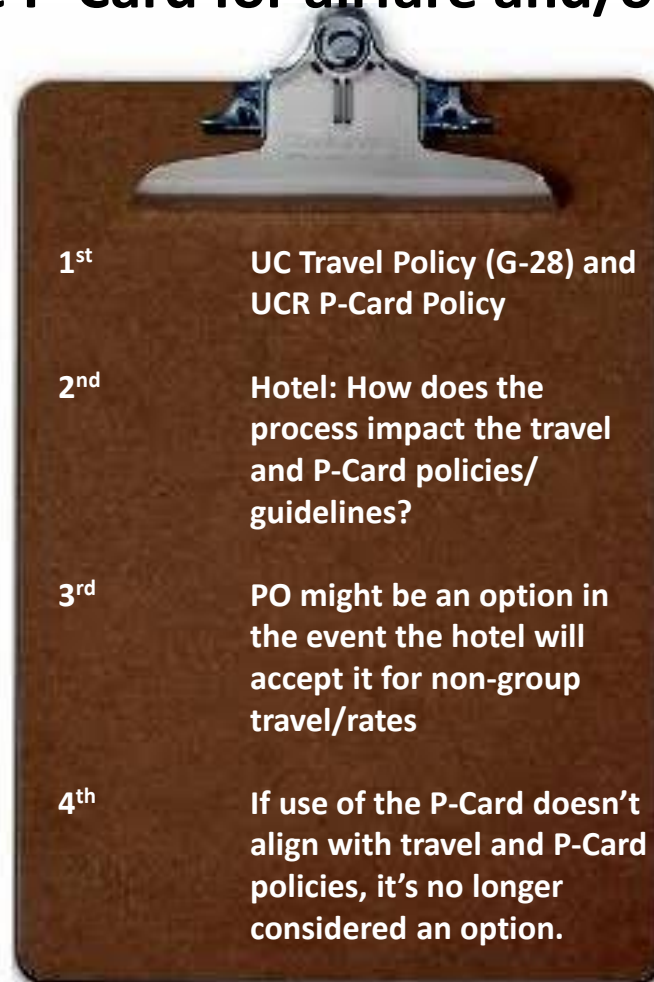
No, you cannot mix personal expenses/time using the card. You must use another method of payment for the intended travel and be reimbursed.



Hybrid P-Card *Best Practices*

- **What should travel coordinators and P-Card cardholders take into consideration before using the P-Card for airfare and/or hotel reservations/payment?**

Review approved travel information and determine the best available option to reserve/pay for hotel given the supplier's information. As discussed use of the available *options* (P-Card, Corp Card, personal credit card or PO) should be determined on a case-by-case basis only:



Hybrid P-Card FAQs

- **Is it ok to add my P-Card to a traveler's profile?**

No

It's not recommended. The P-Card should never be placed in a file or document that the traveler or others have access to view/use. This is referenced on the P-Card Agreement Form and signed by Cardholders.

"Item #2: I agree that as a designated cardholder for my department I cannot transfer use, assign use, or give access to use my card to anyone."

- **Can a higher class airfare rate be purchased on the Pcard for travelers that have a documented medical accommodation requirement?**

Yes

Provided the doctor's note requiring this accommodation is in place prior to purchasing the airfare via P-Card. The original doctor's note must be marked "Confidential" & sent via intercampus mail to the Travel Desk to keep on file. Notations must be added to all iTravel Trip ID's via the comments section: Doctor's note for accommodation on file with the Accounting Office.

Recommended: Coordinate within the department' Admin Unit: P-Card Cardholder, Travel Coordinator and internal HR point of contact.

Hybrid P-Card FAQs

- **Can a conference registration fee be paid on the Pcard?**

Yes

Implemented Aug-2018. Best practice is for the Cardholder and FO are aware of registration information: Agenda/itinerary, cancellation policies, meals and lodging (included or separate) prior to payment.

Ensure all additional costs for expenses to include meals, extra tours, parking, internet, etc. not covered with the actual conference registration are paid on the Corporate T&E or personal credit card.

- Agenda/Itinerary: Show what's included with the conference registration.
- Cancellation policies: Is an alternate allowed to attend in place of the person initially registered? Full, partial refund or credit only?
- The registration fee must be recorded on iTravel as "prepaid" via P-card.

Reminders: P-Card/T&E Do's & Don'ts

Do's

- Airfare, lodging for business travel for others can be paid via the P-Card.
- Use Connexus to book through UC's Preferred Travel Agencies.
- Remember to manually register trips booked outside of Connexus or via SWABIZ, on the [Risk Services](#) website and complete the Traveler Insurance form **before** an out-of-state trip occurs.
- Establish a "Trip" in iTravel before charging travel expenses on the P-Card.
- Reference the trip number on travel related payments paid via a P-Card and on the PCT.
- Process travel related payments paid via a P-Card as **prepaid items** on the travel expense claim, even if no reimbursement of expenses is due to the traveler.
- Conference registration can be paid via the P-Card.

Don'ts

- Airfare that contain **any personal legs of travel.** (i.e. a destination other than the primary business destination) **may not be purchased on a P-Card.**
- The P-Card cannot be used for meals.
- **The P-Card cannot be given to a traveler to take on a trip (unless he/she is the P-Card holder).**





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QUESTIONS??

Send Your Questions To:

Purchasing & eBuy: ebuyhelp@ucr.edu
Procurement Card: procard@ucr.edu
Travel: travelfeedback@ucr.edu